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BUSINESS STATISTICS - 27th May, 1941.

Continued expansion of war industries on the one hand and curtailment of supply of civilian goods on the other reflects the growing war effort. Private consumption appears not to have increased materially though employment and wage-earnings are at a record level. There is less private building and development of building societies though somewhat revived, is still relatively unimportant. New motor sales have decreased. Seasonal conditions show less promise but as yet are not critical.

C O N T E N T S.

PART  
I

Season: Light rain in eastern N.S.W. - more rain needed.

Export Prices and  
External Conditions:

Export prices steady. Export prospects.  
Conditions in U.K. - Industrial mobilisation -  
Prices rising. Conditions in U.S.A. - Production  
increasing. Finance for war industries. Food for  
Eire. Iraqi oil. Export credit for China.

Currency  
Relationships:

Sterling firm in New York.

Wool:

Arrivals and appraisalment of wool in Sydney.  
Stocks in U.S.A. Curtailment of Civilian  
Supplies in Australia.

Wheat:

Futures ease slightly in Chicago. Indian  
production, 1941. Local market quiet. Prices  
unchanged.

Butter:

Production declining. Change in type of dairy  
produce for Britain.

Metals:

Export of tin banned in U.K. Price of tin lower  
in London. Use of tinplate curtailed in Australia.

II

Wholesale Trade:

Employment (N.S.W.) - mid-April, 1941.  
Sales under Sales Tax Acts - Mar. & Mar.Qr., 1941.

Retail Trade:

Employment (N.S.W.) - mid-April, 1941.  
Activity in City shops - March & Mar.Qr., 1941.

III

Employment, N.S.W.

Persons employed in mid-April, 1941.

Manufacturing  
Industries:

Employment (N.S.W.) - mid-April, 1941.  
42 Large Factories - Sales, etc. - Mar. & Mar.Qr. 1941

Gas and Electricity:

Index of Consumption, Sydney - April, 1941.

Motor Vehicles, N.S.W.:

New Vehicle Sales - April, 1941.  
No. on Register - At 30th April, 1941.

Wireless Licenses:

No. in force in N.S.W. at 30th April, 1941.

Building Permits:  
(Metropolis)

Value and  
No. of Dwellings - April and Jan.-Apr., 1941.

Building Societies:

Operations in March Qr., 1941.

## PART I PRIMARY AND EXPORT INDUSTRIES.

SEASON. There was light to moderate rain with some heavy falls in eastern New South Wales during the past week-end. Much of the wheat belt benefited but more rain is needed to make conditions satisfactory for early development of crops. Rain is also needed in coastal dairying districts and in inland pastoral districts.

EXPORT PRICES AND  
EXTERNAL TRADE  
CONDITIONS.

Australian export prices are steady and have changed little during the war period. The index number (Commonwealth Bank) is about 20 per cent. above the pre-war level, and about equal to the average in the prosperous years 1935-36 to 1937-38:-

	<u>Av.1935-36 to 1937-38.</u>	<u>Aug.,1939.</u>	<u>Av.1940.</u>	<u>Mar.1941.</u>
Index No. (Av.1927 = 100)	83.5	66	81.7	82.7

The recent announcement in Australia that Britain will buy Australia's surplus food is interpreted in London only as a re-affirmation of policy; transport remains the problem, and no specific arrangements for increased shipping space have been reported.

In the United Kingdom 3.75 million acres have been brought under cultivation during the war period. Skilled labour is to be released from the Army for iron and steel industries. Tank and gun production in March Qr. 1941 was 50 per cent. greater than in Dec. Qr., 1940. Organisation of labour under the mobilisation scheme continues but labour is said to be adequate for present needs. About £stg.120 m. was subscribed in London's War Weapons Week. The supply of meat in restaurants is being more strictly controlled. British commodity prices are still rising very gradually. Index numbers of wholesale prices (Economist 1927=100) are:-

<u>1939.</u>		<u>1940.</u>	<u>1941</u>		
<u>Aug.23.</u>	<u>Dec.13</u>	<u>Dec. 4.</u>	<u>Mar. 4.</u>	<u>Apr.8.</u>	<u>May 6.</u>
69.1	89.0	100.1	103.5	104.3	104.6

In the United States the R.F.C. has made available a further amount of \$650m. for expansion of aircraft and other defence facilities. Though hampered by strikes production is increasing. Some major stoppages have been settled by negotiation.

Britain is believed to be providing a £stg.5 m. export credit for China for war materials. The United States will supply food to Eire (two ships have been made available) but not war materials. It is reported that the flow of oil from Iraq has been diverted from the Haifa to the Tripoli (Syria) pipe line.

INTERNATIONAL  
CURRENCY  
RELATIONS.

In the open market in New York sterling has completely recovered the slight loss of value in exchange with the dollar which occurred early in the Greek campaign. The quotation (mean) on May 24, 1941 was \$4.035 to £stg. compared with the official rate in London of \$4.03 to £stg.

WOOL. The dry late summer has caused pastoral conditions to deteriorate and rain is needed almost generally. Suspension of slaughtering of lamb and mutton for export has caused an irregular market for fat livestock.

Wool appraised this season in Sydney up to the end of the series which ended on May 23, 1941 totalled 1,217,000 bales compared with 1,307,064 bales in the corresponding period of 1939-40, and exceeded the quantity in any other preceding similar period.

From July 1 to May 22 (1940-41) the quantity of wool received in Sydney was 1,196,299 bales as against 1,254,217 bales in the corresponding period of last season.

It is reported that arrangements have been made for direct shipment of wool to the United States from New Zealand as well as from Australia. British interests view this decision as prejudicial to the future of their long-established re-export



## PART I (Continued)

trade in raw wool. United States stocks of imported apparel wool on April 1, 1941 were estimated as 149 m.lb. This is twice the quantity held a year earlier, but it includes wool accumulated in the strategic reserve. Prices of wool tops have risen in New York.

In Australia it has been announced officially that no more woollen yarns, blankets or fingering wool will be available for civilian purposes because filling of local and oversea defence requirements absorb all manufacturing capacity.

**WHEAT.** Wheat futures in Chicago have declined a little below the recent high point and on May 24 Sept. options were  $99\frac{1}{4}$  cents a bushel compared with  $100\frac{3}{8}$  cents a bus. on May 14. Quotations in Winnipeg remained steady (July futures were  $77\frac{1}{2}$  cents a bus. on May 23). Severe drought conditions are reported over the eastern half of the United States. Wheat production in 1941 in India is now estimated at 372.2 m. bus. compared with 389 m.b. previously forecasted. Indian production in 1940 was 402.6 m. bus. Useful rain has fallen in Western Europe.

Further sales of wheat for flour for export have been made in the local market but generally trading has been quiet. No wheat for export as grain is available in New South Wales. The Aust. Wheat Board's prices are unchanged. For silo wheat for flour for local consumption the price is 3s.11 $\frac{1}{4}$ d. per bus., ex trucks Sydney. The wholesale price of flour in Sydney has remained at £12.13s. a ton (including tax) since Nov. 14, 1940.

## PRICES OF WHEAT IN NEW SOUTH WALES.

<u>Bulk Wheat.</u>	Seasons ended November.				April.		May 26,
	Av.† 31-35.	1937.	1939.	1940.	1940.	1941.	1941.
	Shillings and pence per bushel.						
Ex trucks, Sydney	2 9½	5 3	2 5	--	3 11(b)	3 11¼(b)	3 11¼(b)
Equiv.ex farm at country siding (a)	2 2½	4 8	1 9½	(c)	(c)	(d)	(d)

(a) Exclusive of bounty. (b) Prices for sale for local consumption.

(c) Farmers have received about 2s.10d.(net) for 1939-40 bulk wheat.

(d) Initial advance gives about 2s.5d. (net) at country siding.

(c) and (d) Further advances are expected.

**BUTTER.** Except on the far North Coast all dairying districts are urgently in need of rain. The Upper Hunter Valley is again suffering drought. Local production of butter is still decreasing; present output is about equal to consumption but butter is coming in from other States to build up stocks for the winter.

Commonwealth Ministers have asked the dairying industry to make more cheese and less butter, and to increase production of condensed and powdered milk. These changes are to meet the shortage of refrigerated shipping space. The export of butter in tins is being tried. By the end of this year it is expected that storage space for 80,000 tons of butter (a little short of an average year's export to Britain) will be available in Australia.

Butter prices are unchanged. The local wholesale price is 158s.8d. a cwt. and the export parity of the British contract price is 137s.2d. a cwt. The course of butter prices in recent years was as follow:-

## PRICES OF BUTTER - SYDNEY - EXPORT AND LOCAL.

	Average - Seasons ended June.					May 26, 1941.
	1929-32.	1933-36.	1937-39.	1939.	1940.	
	Shillings (Australian) per cwt.					
	Export Parity	135	88	122	123	137(a)
Local Sales	173	134	150	159	159	159

(a) Agreed price for British purchase, 1939-40 and 1940-41.

/METALS.....

METALS. In London the maximum prices fixed by the British Ministry of Supply in Dec., 1939 for electrolytic copper (£62) lead (£25) and spelter (£25.15s.) - per ton, duty paid, delivered to buyer still stand.

The British Board of Trade has suspended all licenses for the export of tin (closely supervised export of tin plate is still permitted) in order to enable British stocks of tin to be increased. As a result of this the price of tin in London, which was around £stg.270 a ton since early in March, 1941 declined and was £stg.266 a ton at the end of last week. Silver also tended slightly lower after continuing without change at 1s.11½d. an oz. between March 14 and May 12, 1941. The quotation on May 23 was 1s.11¾d. an oz.

In Australia restrictions have been placed on the use of tinplate to conserve stocks required for containers for canned goods for export for overseas Empire forces.



**WHOLESALE TRADE.** In March Qr., 1941 sales in New South Wales recorded under the Sales Tax Acts amounted to £50.72 m. compared with £47.93 m. in March Qr., 1940 and £45.56 m. in March Qr., 1939. These figures include direct factory sales. The increase may be attributed to Government purchases of war goods and higher prices. There is little to suggest any significant increase in general civilian buying demand. Employment in wholesale firms with ten or more employees has shown little other than seasonal movements; the increase between April, 1938 and 1941 (972) was less than that of the one year ended April, 1938 (1,064), but employment in wholesaling has no necessary bearing upon wholesale turnover. It is doubtful if the emergency storage of foods and groceries (under the scheme outlined in B.S. 1941/30, p.5) affected sales prior to May, 1941. Restrictions have been made in the use of paper and tin plate in merchandising and official or trade limitations on manufacture impose community rationing of certain goods (e.g. tobacco, wool).

The course of wholesale trade in recent years is illustrated as under:-

WHOLESALE TRADE - NEW SOUTH WALES.

	Sales by Registered Traders.				Employed in Wholesale Firms with Ten or more Employees.		
	February.	March	March Quarter.		Feb.	March	April.
			Amount	Increase over preceding year.			
	£m.	£m.	£m.	per cent.	Persons	Persons	Persons.
1932	10.17	9.55	28.96	1.0	17,638 (June, 1933)		
1938	15.73	15.79	45.72	4.3	24,857	25,279	25,598
1939	16.54	15.78	45.56	- 0.3	25,555	25,682	25,834
1940	14.64	16.97	47.93	5.2	25,674	25,963	25,927
1941	17.49	17.40	50.72	5.8	26,003	26,382	26,570

**RETAIL TRADE.** The changing date of Easter (in March in 1940 and April in 1941) affects comparisons relating to employment and trading in retail trade. In most recent months the number of persons employed in retail firms with ten or more employees has changed only moderately in comparison with the corresponding month of the preceding year.

	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.
	Increase (+) or Decrease (-) in persons employed.					
1939-40 to 1940-41	+ 541	+ 1390	- 382	- 88	+ 449	+ 1365

The number of persons employed in these larger shops is shown below. There has been a steady increase in the City of Sydney and latterly an increase in the Newcastle District; some recovery in the suburbs of Sydney and a downward trend of employment in shops in country towns. The expansion of war industries has supported trading activity in Sydney and Newcastle.

	City of Sydney.	Suburbs of Sydney.	Newcastle District.	Country Towns.	Total, N.S.W.
Persons employed by retailers with ten or more employees.					
April, 1938	35,804	4,107	2,522	8,762	51,195
1939	36,252	3,990	2,541	8,578	51,361
1940	36,537	4,018	2,436	8,415	51,406
1941	37,728	4,074	2,650	8,319	52,771

**City Shops.** Under all headings except food and perishables sales in a group of large city shops were greater in value in March, 1941 than in March, 1940. Total sales increased by 13.9 per cent. but the changing date of Easter renders comparisons unsatisfactory. In March Qr. sales in these shops were 10.9 per cent. greater in value in 1941 than in 1940, with the greatest increases in sales of wearing apparel, piece goods, fancy goods and sports and travel goods. At the end of March, 1941 stocks were approximately the same in value (at cost) as a year earlier. During the quarter the average number of employees was 2.1 per cent. greater and the amount of salaries and wages paid to them was 4.3 per cent. greater than in March Qr., 1940.

PART III INDUSTRIES.

EMPLOYMENT. In March-April, 1941 the rising trend of employment was checked - partly by seasonal influences - and the number of persons employed in the middle week of April (902,116) was not quite as great as in March, 1941, though 49,985 and 64,464 greater than in April 1940 and 1939, respectively (employment in April, 1940 was affected by the industrial stoppage in coal mines.) The course of employment in recent months and corresponding months of the preceding two years was as follows:-

	<u>Aug.</u>	<u>Sept.</u>	<u>Oct.</u>	<u>Nov.</u>	<u>Dec.∅</u>	<u>Jan.x</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Apr.</u>	<u>Incr.</u> <u>Aug.-Apr.</u>
Persons employed (excluding relief workers) - Thousands.										
1938-39	834.6	840.5	837.4	841.4	859.7	820.4	833.6	834.1	837.7	3.1
1939-40	831.8	838.4	850.0	856.9	875.5	851.4	859.4	865.7	852.1 <sup>★</sup>	20.3
1940-41	870.3	874.1	879.9	883.4	905.0	883.9	893.6	902.7	902.1	31.8

∅ Includes many seasonally employed in shops. x Affected by holiday period.

★ Coal strike.

Between August, 1939 and April, 1941 there was an increase of 70,310. Of this increase 60,404 were in private employment (largely in factories - see succeeding note). Government (Commonwealth, State, Water Board, etc.) employees increased by 12,200 (with increases in Government factories an important element) and local government employees decreased by 2,294.

Expanding war industries and enterprise have caused the increase in employment, and there was a further increase in metal-working industries in March-April, 1941. The number of adult males registered as unemployed at State Labour exchanges

was 20,408 at the end of April, 1941  
 compared with 50,813 " " " " " 1940,  
 and 52,851 " " " " " August, 1939

In addition to the 32,443 unemployed males absorbed, the additional labour (much greater-on account of the great number of enlistments - than the increase shown above) has been drawn from normal increase (youths and girls entering industry), males and females formerly not in the wage-earning group, return of retired people to employment, and some transfer of self-employed workers to wage-occupations.

With enlistments again proceeding actively, and war industries still expanding labour has become an acute problem. Reserved occupations are under review. Local committees to control dilution of skilled labour in engineering, boiler-making and blacksmithing trades have been appointed, and steps to "dilute" sheet-metal workers electrical fitters and mechanics, and moulders have been taken. The period of technical training in schools in engineering is to be shortened and training is to be completed in workshops; the Commonwealth Government will subsidise employers of trainee-workers to the extent of 50 per cent. of wage payments. Curtailment of civilian supply of certain manufactures is evidence of the beginning of what must in time be a large-scale transfer of resources from civil to war activities.

Particulars of employment are shown comparatively below; increases (per cent.) during the war period are indicated in the final column. The figures include all persons - males, females, adults and minors - in employment. Relief workers are excluded, as are men absent on defence services (except a small number whose former employers have kept them on their payrolls).



## EMPLOYMENT IN NEW SOUTH WALES.

(Excluding relief workers and men in the Armed Forces not on Civil pay sheets).

Group	Persons employed in middle week of -						Increase Aug., 1939 to Apr., 1941. per cent.
	Apr., 1937	Apr., 1939	Aug., 1939	Apr. <sup>1</sup> / <sub>4</sub> , 1940	Mar., 1941	Apr., 1941	
	000	000	000	000	000	000	
All Employment	788.9	837.7	831.8	852.1	902.7	902.1	+6.5
Private Employment	646.9	685.6	680.3	698.4	742.0	740.7	+8.9
All Factories (a)	213.1	229.0	228.7	239.5	269.8	269.2	+17.7
In Firms with Ten or More Employees							
Mines	18.6	21.5	21.7	20.7	21.0	20.8	-4.1
Retail Trade	49.2	51.4	51.3	52.1	52.5	52.8	+2.9
Wholesale Trade	24.5	25.8	25.4	26.0	26.4	26.6	+4.7
Offices & Commerce	25.2	27.2	27.1	29.3	29.5	28.9	+6.6
Ship'g. & Rd. Transport	21.2	22.2	20.7	22.2	20.7	20.7	...
Personal Services (b)	27.5	30.4	30.1	30.9	31.3	31.6	+5.0
Other Industries	20.1	19.5	18.5	18.3	18.4	18.4	-0.5

(a) Including working proprietors. (b) Includes hospitals, professions, amusements, hotels, etc. <sup>1</sup>/<sub>4</sub> Affected by coal strike. x Revised.  
+ Increase. - Decrease.

**MANUFACTURING INDUSTRIES.** There were 269,200 persons employed in factories in New South Wales in the middle week of April, 1941. This was 600 less than a month earlier, and otherwise a greater number than ever before. During the recovery years (1932-38) there was a substantial growth of manufacturing (including virtual duplication of capacity of the heavy iron and steel industry). After a lull in 1938-39 and under the stimulus of war enterprise, manufacturing has developed at an unprecedented rate. The index number of factory employment is now 149 compared with 100 in 1928-29 (pre-depression peak year), 126 in August, 1939 and 132 in April, 1940. During the war period the number of persons employed in factories has increased by 40,500 or by 17.7 per cent. And this increase takes no account of widespread overtime working now proceeding.

## PERSONS EMPLOYED IN ALL FACTORIES IN NEW SOUTH WALES.

	NUMBER EMPLOYED IN MIDDLE WEEK OF -								INCREASE IN LAST	
	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	6 mths.	12 mths.
	000	000	000	000	000	000	000	000	000	000
1938-39	229.7	230.4	230.6	230.0	223.0	227.9	230.6	229.0	- 0.6	1.1
1939-40(a)	230.7	236.7	240.4	242.2	238.5	240.7	244.0	239.5	2.8	10.5
1940-41(b)	250.6	253.9	256.7	262.3	258.4	262.8	269.8	269.2	15.3	29.7
Incr. (a) to (b)	19.9	17.2	16.3	20.1	19.9	22.1	25.8	29.7		

-Minus sign (-) denotes decrease.

The slight decrease in the month March-April, 1941 is due to seasonal decreases in fruit-canning and jam making, and in the clothing trade, and is not significant. New munitions and armament factories are in building and others are planned. Heavy demands for army clothing, etc. (as well as war materials) from other Empire countries have involved curtailment of home civilian supply. In Sydney and suburbs permits to erect or extend factory buildings were valued at £317,000 in the eight months ended April, 1941 compared with £626,000 in the corresponding period of 1939-40.

The following details of employment in private factories with ten or more employees shows clearly the expansion of industries concerned with the supply of war materials

/as the.....

## PART III (Continued.)-

as the dominating factor in recent development. Percentage increases during the war period are given at foot of the table:-

Middle week of-	Cement Bricks Glass etc.	Chemicals, etc.	Industrial metals	Textiles and Clothing	Food and Drink	Wood-working, etc.	Paper & Printing.	Rubber
	Number of persons employed - Thousands.							
April 1935	7.45	5.25	42.62	30.80	23.07	7.74	11.84	2.63
August, 1939(a)	11.51	7.24	61.78	36.96	27.96	9.89	14.81	3.68
April, 1940	11.75	8.54	63.52	39.30	29.97	9.82	15.11	4.04
March, 1941	12.92	9.06	82.73	41.41	32.89	10.39	14.48	4.30
April, 1941(b)	12.77	9.09	83.86	41.04	31.25	10.43	14.50	4.38
Incr. (a) to (b) %	10.9	25.6	35.7	11.0	11.8	5.5	-2.1	19.0

Some indication of the physical increase in factory production is supplied by particulars of sales from 42 large factories. In March Qr., 1941 these amounted to £11.74 m. compared with £9.21 m. in the corresponding quarter of 1939.

Over the same period employees in these factories increased by 19 per cent., but the weekly wages bill rose by 30 per cent., partly the result of higher rates of wages, but mainly due to full-time and overtime working by the greater number engaged. Other comparisons are as follow:-

## MANUFACTURING INDUSTRIES - NEW SOUTH WALES.

	ALL FACTORIES		FORTY-TWO LARGE FACTORIES.					
	Employment		March			March Quarter.		
	April					(Monthly Average).		
	Number	Index Number	Sales	Employees.	Wages paid weekly	Sales	Employees	Wages paid weekly
	1928-29 =		£000	000	£000	£000	000	£000
	180,756	100						
1937	213,100	118	3,147	22.2	83.9	2,872	21.8	82.1
1938	227,900	126	3,570	23.2	94.9	3,163	23.2	93.9
1939	229,000	127	3,406	22.9	96.1	3,071	23.1	95.8
1940	239,500	132	3,562	23.9	103.1	3,414	23.8	101.7
1941	269,200	149	4,196	27.2	124.6	3,912	26.5	119.6

GAS AND ELECTRICITY. The consumption of gas and electricity in Sydney and suburbs in the four months ended April was about  $10\frac{1}{2}$  and  $4\frac{1}{2}$  per cent. greater in 1941 than in 1939 and 1940, respectively. The index number in April, 1941 was 41 per cent. above that for April, 1929-31. The demand for power and light has increased as war industries have expanded and as additional shifts have been worked in many factories. Factors contributing to the increase over the past ten years include growth of population, post-depression expansion of secondary industries and increased use of modern power machinery and equipment commercially and in private homes. There was an industrial dispute in the gas industry from April 7 to 28 but gas supply was maintained by staff employees.

## INDEX OF CONSUMPTION OF GAS AND ELECTRICITY - SYDNEY AND SUBURBS.

1929      1932      1937      1939      1940      1941

Index Numbers : Average 1929-31 = 100.

April	104	96	119	125	137	141
Calendar year	105	96	119	131	135	-

MOTOR VEHICLES. After increasing slightly during the summer months new motor vehicle sales have declined again. In April, 1941 new registrations averaged 168 per week, compared with 357 a week in April, 1940 and 660 in April, 1938. The numbers...



## PART III. (Continued).

The numbers of new vehicles sold in recent months and the corresponding months in recent years are as follow:-

AVERAGE WEEKLY NUMBER OF NEW MOTOR VEHICLES REGISTERED, N.S.W. <sup>ø</sup>

	CARS, CABS AND OMNIBUSES.						LORRIES AND VANS.					
	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.
1937-38	483	534	427	470	505	478	246	222	163	184	177	182
1938-39	428	457	325	505	435	393	202	163	117	127	131	130
1939-40	368	344	246	333	268	243	169	127	87	110	106	114
1940-41	173	163	141	163	167	121	77	69	53	70	71	47

<sup>ø</sup> Exclusive of trailers and of vehicles in defence services.

Under new petrol ration scales to operate from June 1, 1941 the quantity available for vehicles used for non-business purposes will afford a mileage of about 2,000 a year. To prevent petrol hoarding the sale of motor spirit in drums has been curtailed and re-sellers may deliver only into fuel tanks of motor vehicles. It is understood that production of power alcohol in Australia is likely to be increased greatly. Delivery of petrol in bulk from the Glen Davis oil shale plant is to commence shortly. The output is expected to be about 10 million gallons a year for the present.

With the object of stimulating the use of producer gas, the Commonwealth Government has invited tenders for the manufacture for sale (and servicing) to the public of producer gas units (sale of 500 in any State to be guaranteed if prices tendered are reasonable). It is proposed to establish charcoal depots along all main highways.

The number of motor vehicles on the register has varied only slightly in recent months but there was a decrease of about 5 per cent. in the first year of the war. At the end of April, 1941 there were 9,759 fewer cars and 1,915 fewer lorries and vans than on August 31, 1939 (pre-war month). Some of this decrease is due to inspection as to road-worthiness before renewal of registration introduced in October, 1939.

NUMBER OF REGISTERED MOTOR VEHICLES - NEW SOUTH WALES <sup>ø</sup>

		1939		1940		1941		
		April	Aug.	Apr.	Sept.	Jan.	Mar.	Apr.
Cars	000	214.7	216.6	213.6	204.8	207.4	206.9	206.9
Lorries & Vans	000	76.4	77.6	76.4	74.7	75.6	75.7	75.7
All Vehicles	000	325.9	329.2	323.5	312.1	316.2	315.9	316.0

<sup>ø</sup> Exclusive of vehicles on defence services. Includes trailers.

WIRELESS LICENSES. There were 494,004 Broadcast Listeners' Licenses in force in New South Wales on April 30, 1941. The increase in licenses has been greater during the past twelve months than in either of the preceding two years. Between Jan. 1 and Apr. 30 increases were:-

1937, 7,555; 1938, 10,868; 1939, 8,253; 1940, 9,284; 1941, 10,129.

Particulars of the number of licenses current at various dates and of increase in years ended April are as follow:-

BROADCAST LISTENER'S LICENSES IN FORCE IN NEW SOUTH WALES.  
(Including Australian Capital Territory.)

	<u>1932</u>	<u>1934</u>	<u>1936</u>	<u>1938</u>	<u>1939</u>	<u>1940</u>	<u>1941</u>
Number of Licenses - Thousands.							
At 30th April	135.0	214.4	307.8	397.9	428.8	451.2	494.0
Increase in year ended April	14.7	41.4	33.9	49.5	30.9	22.4	42.8

## PART III (Continued)

BUILDING PERMITS - METROPOLIS.

(Note: Building permits do not include Government buildings.)

Private building appears to be decreasing and this is not fully offset by considerable public building. Building is at a low ebb in the city. Permits for brick houses and for factory premises remain at a high level; there is a good deal of flat building, but other kinds of building have decreased.

New housing proposed in Jan.-Apr. (2,870 units) was below the rate through the years 1938, 1939 or 1940, though greater than in Jan.-Apr., 1940 (2,684 units).

Permits granted in Sydney and suburbs in April, 1941 for the erection of private buildings amounted to £775,000 - the smallest total since 1936. Private building activity appears to be decreasing. The spurt in proposals in Nov. and Dec., 1940 (to forestall the necessity of sanction under the Building Control regulations) was clearly incidental. Totals for recent months fall below those of a year ago and in the four months ended April decreased by 6.9, 17.3 and 28.2 per cent. in comparison with one, two and three years earlier, respectively. Particulars of value by months are:-

		<u>Sept.</u>	<u>Oct.</u>	<u>Nov.</u>	<u>Dec.</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Apr.</u>	<u>Sept.-Apr.</u>
1937-38	£000	1033	963	1129	1153	905	899	1303	1256	8,641
1938-39	£000	1110	933	1325	937	864	999	993	932	8,093
1939-40	£000	800	1205	797	602	699	755	870	1041	6,769
1940-41	£000	840	833	1284	1454	696	804	857	775	7,543

There has been a considerable volume of public building but public and private building together in recent months have failed to reach the value of private building alone in corresponding months of 1939. In April the combined total was £801,000 this year and £1,073,000 in 1940. In the eight months ended April corresponding figures were £8,347,000 and £7,155,000.

## VALUE OF PUBLIC AND PRIVATE BUILDING PROPOSALS - METROPOLIS.

		<u>Sept.</u>	<u>Oct.</u>	<u>Nov.</u>	<u>Dec.</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Apr.</u>	<u>Sept.-Apr.</u>
1939-40	£000	832	1315	836	702	714	789	894	1073	7,155
1940-41	£000	930	867	1395	1567	1020	870	887	811	8,347

Private building in the City of Sydney has decreased greatly and is at a low ebb. It is still considerable in the suburbs where there has been a gradual decline. Comparisons of value of private building permits are as follow:-

	City Permits (£000)						Suburban Permits (£000)					
	1936	1937	1938	1939	1940	1941	1936	1937	1938	1939	1940	1941
April	170	195	329	128	62	37	531	796	927	804	979	738
Jan.-Apr.	998	394	996	555	287	193	2358	2548	3367	3232	3078	2939

A notable feature of recent returns is the activity in the erection of brick houses. The value of permits for these in the six months ended April, 1941 was £2,424,000 and about 17½ and 16 per cent. greater than one and two years previously. Permits for wood and fibro houses, however, show a further decrease in value:-

## Building Permits to Erect, Alter or Add to Houses - Metropolis.

	Brick Houses. (£000)						Wood and Fibro Houses. (£000)					
	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.
1938-39	402	327	332	363	387	272	89	47	63	81	79	60
1939-40	344	255	305	396	360	402	70	38	37	48	62	171
1940-41	446	326	410	391	465	386	58	43	49	42	50	62



## PART III (Continued)

In April, 1941 permits for each main class of building other than flats and factories were lower in value than in April, 1940. The expanding industrial war effort is reflected in a high level of factory construction; in the eight months ended April permits for factories amounted to £818,000 in 1938-39, £626,000 in 1939-40 and £817,000 in 1940-41. Permits for hotels have declined sharply. Expenditure of amounts in excess of £1,000 on hotel buildings requires approval under the Building Control regulations.

The following statement illustrates trends in the value of permits for the various classes of buildings in recent years:-

## PRIVATE BUILDING PERMITS GRANTED - SYDNEY AND SUBURBS.

Includes Alterations and Additions. Excludes Government Buildings.

Period	Houses.		Flats. (a)	Hotels, Guest Houses.	Shops. (b)	Factor- ies. (c)	Other Build- ings.	Total.
	Brick.	Wood & Fibro.						
	£000	£000	£000	£000	£000	£000	£000	£000
1938 ø	408	76	283	70	48	82	203	1170
1939 ø	373	76	232	44	43	111	139	1018
1940 ø	391	74	224	51	31	98	107	976
Apr., 1939	272	60	222	52	37	174	115	932
" 1940	402	171	169	33	28	70	168	1041
" 1941	386	62	175	3	16	82	51	775
Jan.-Apr. 1939	1359	284	791	212	170	533	438	3787
1940	1463	318	563	218	128	288	387	3365
1941	1652	204	710	19	78	288	181	3132

ø Monthly average. Includes (a) conversions to flats (b) shops with dwellings and (c) public garages.

DWELLING HOUSES. The number of net additional dwellings included in building permits in April was 695 in 1941 compared with 909 in 1940, 666 in 1939 and 1003 in 1938. The numbers of dwellings of certain kinds proposed in each of the first four months of the past three years were as follow:-

	Brick Houses.				Wood & Fibro Houses.				Flats (New and Convtd.)			
	Jan.	Feb.	Mar.	Apr.	Jan.	Feb.	Mar.	Apr.	Jan.	Feb.	Mar.	Apr.
1939	323	358	365	252	115	153	146	104	217	305	350	315
1940	284	371	312	377	74	88	109	271	129	220	218	285
1941	346	336	407	342	80	67	78	101	212	294	380	261

Detailed comparisons covering the four months ended April show increases in brick houses and in dwellings in new flat buildings and a decrease in wood and fibro houses this year in comparison with last year and decreases in every class in comparison with 1938:-

## DWELLINGS INCLUDED IN PRIVATE BUILDING PERMITS - METROPOLIS.

Type of Dwelling.	Four Months ended April.					Movement 1939 to 1941
	1937.	1938.	1939.	1940.	1941.	
	Number of Dwelling Units.					Per cent.
Houses - Brick, etc.	1004	1475	1298	1344	1431	+ 10.2
- Wood, Fibro, etc.	317	458	518	542	326	- 37.1
Total - Houses.	1321	1933	1816	1886	1757	- 3.2
Flats - In new buildings	856	1521	1105	761	1096	- 0.9
- In converted "	138	136	82	91	51	- 37.8
With shops, hotels, etc.	42	55	61	44	28	- 54.1
Total - Flats, etc.	1036	1712	1248	896	1175	- 5.8
Grand Total	2357	3645	3064	2782	2932	- 4.3
Less Demolitions & Conversions	175	100	91	98	62	- 31.9
Net additional dwellings	2182	3545	2973	2684	2870	- 3.5

+ Increase. - Decrease.

## PART III (Continued)

The number of net additional dwellings proposed in the first four months of this year represents an annual rate of 8,610. This is below the number included in building permits in any of the preceding three years and shows a decrease of about 27½ per cent. in comparison with the number in 1938. High costs of building, reduced activity of co-operative building societies (see following note), war savings and taxation, and general wartime reactions are factors affecting the future trend of new housing. It is understood that new luxury houses and flats may be barred but otherwise official control is unlikely at present to cause curtailment of house and flat building.

## NUMBER OF DWELLINGS PROPOSED - SYDNEY AND SUBURBS.

	Calendar Year.					Jan.-Apr.	
	1929.	Average, 1930-34.	1938.	1939.	1940.	1940.	1941.
Individual Houses	7,095	1,205	6,342	5,847	5,706	1,886	1,757
Flats, with shops, etc.	3,097	656	5,821	4,290	4,135	896	1,175
Net Total (after deducting demolitions, etc.)	9,854	1,839	11,853	9,822	9,558	2,684	2,870

**BUILDING SOCIETIES.** There were six new co-operative terminating building societies formed in New South Wales in March Qr. 1941 - three in the metropolis and three in the country. Some of these were to assist in meeting housing shortages in areas of industrial expansion and in general the formation of new societies has been retarded by the difficulty of arranging finance with lending institutions. In 188 of 194 societies registered at March 31, 1941, shares had been allotted, 181 societies had approved advances and advances had been made by 177 societies. Lending institutions had undertaken to provide £13,890,000; borrowed funds in use amounted to £10,110,000, and members' funds in use were £1,343,000. Contingent liability on Government indemnities amounted to £295,000.

In the last six months 1,359 members have entered societies compared with only 330 in the preceding twelve months but the increase in membership was small relative to that shown during 1938:-

## CO-OPERATIVE TERMINATING BUILDING SOCIETIES, NEW SOUTH WALES.

	Metropolitan.			Country.			All Societies.		
	Members	Shares	Advances made	Members	Shares	Advances made	Members	Shares	Advances made
	No.	000	£000 ø	No.	000	£000 ø	No.	000	£000 ø
At Dec. 31, 1938	12,093	156.6	4,218	5,708	60.6	1,308	17,801	217.2	5,526
Jan.-June, 1939 x	1,273	20.9	1,386	- 287	.3	513	986	21.2	1,899
July-Dec. "	133	7.3	1,278	333	3.1	446	466	10.4	1,724
Jan.-June, 1940	180	3.5	837	60	1.4	292	240	4.9	1,129
Sept. Qr. "	- 47	- .5	366	- 162	- .9	94	- 209	- 1.4	461
Dec. Qr. "	491	8.3	256	96	3.4	102	587	11.7	358
Mar. Qr. 1941	520	9.6	297	252	3.0	58	772	12.7	355
At Mar. 31, 1941	14,643	205.8	8,638	6,000	71.0	2,813	20,643	276.7	11,452

x Basis changed in June Qr., 1939 to include only societies assured of finance.  
ø Exclusive of loans discharged.

Over 82 per cent. of all members had loans approved up to March 31, 1941 totalling £12.53 million of which all but 5.2 per cent. had actually been advanced. The sum advanced in March Qr. 1941 was about the same as in Dec. Qr., 1940, but was 42 per cent. below the amount in March Qr., 1940 and little more than one-third that in March Qr., 1939. Latterly the influence of building societies in promoting house building has waned.

Details of the numbers and amounts of loans approved and made according to purpose to March 31, 1941 by building societies are as follow:-

/Table.....



PART III (Continued)

CO-OPERATIVE TERMINATING BUILDING SOCIETIES, NEW SOUTH WALES.

Purpose of Loans.	Loans Approved.		Advances made.	
	Number.	Amount. £000	Number.	Amount. £000
To build new homes	9,407	7,130	8,882	6,596
To buy existing homes ø	5,907	4,429	5,776	4,321
To re-finance mortgages on homes	1,333	886	1,324	881
To add to or alter homes	312	68	304	66
For other purposes	21	21	21	21
Totals	16,980	12,534	16,307	11,885
Less Loans Discharged	504	433	504	433
Net Totals.	16,476	12,101	15,803	11,452

ø From 50% to 60% comprise newly erected houses.